

## E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE 4

### Selective Review Information Request Completion Certification

If the applicant's authorized representative completed the information in this document, please attach a copy of the letter of agency or other agreement between the applicant and consultant authorizing them to act on the school or library's behalf. For the purposes of this form, in the Employer's Name field, a consultant should enter the name of his or her consulting firm.

SECTION 1: AUTHORIZED SIGNER INFORMATION			
Name		Title	
Email Address		Telephone Office	Fax
Employer's Name			
Employer's Street Address		State	Zip Code
SECTION 2: APPLICANT INFORMATION			
Billed Entity Name ACADEMIA SAN JOSE ELEMENTAL		Billed Entity Number 205385	
Funding Year 2004 Forms 471 Application Numbers 406993, 407019			
SECTION 3: CERTIFICATION STATEMENTS			
<ul style="list-style-type: none"> <li>▫ I certify that I prepared the responses in this document on behalf of the above named entity.</li> <li>▫ I certify that despite any budget deficits, fund-raising effort shortfalls, or other uncertainties that the funding source(s) identified for my applicant share of E-rate will not be affected.</li> </ul>			
Authorized Signer's Signature		Date	
Authorized School or Library Official's Signature		Date	

### Selective Review Information Request Checklist:

Remember to include all of the following in your response:

- ✓ Copies of signed and dated contracts relating to the Form(s) 471 for all contracted services, except those contracts that are state master contracts.
- ✓ Copies of all requests for proposals, etc., where a vehicle other than the Form 470 was used for procurement.
- ✓ Copies of all bids that were received for all funding requests.
- ✓ Complete documentation regarding the process used for selecting your service provider(s).
- ✓ Copies of any consulting agreements.
- ✓ Correspondence between the consultant/service provider and the school/library regarding the competitive bidding process and the application process.
- ✓ Copy of your technology plan that supports your funding request for Funding Year 2004.
- ✓ Fax Back Pages 1-4.
- ✓ Approved operating budget which includes both revenues and expenses or alternative budget documentation.
- ✓ Letter of agency or agreement if responder is authorized representative of the eligible entity, if required.

**SUPERINTENDENCIA DE I  
CATOLICAS  
PROGRAMA E-RATE  
FAX (787) 272-0771**

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FACSIMILE TRANSMITTAL SHEET

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TO: Jennifer Hung	FROM: Marieglorie Zapata
COMPANY: PIA Selective Review	DATE: 10/15/2004
FAX NUMBER: 1-973-599-6515	TOTAL NO. OF PAGES INCLUDING COVER: 12
PHONE NUMBER:	SENDER'S REFERENCE NUMBER:
RE: ACADEMLA SAN JOSE	YOUR REFERENCE NUMBER:

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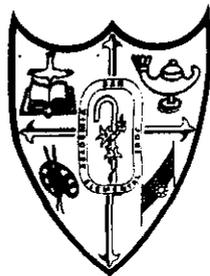
URGENT     FOR REVIEW     PLEASE COMMENT     PLEASE REPLY     PLEASE RECYCLE

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NOTES/COMMENTS:

Enclosed are requested documents.

Marieglorie Zapata  
E-Rate Administrative Assistant  
e-mail: [mzapata@escuelascaticas-sj.org](mailto:mzapata@escuelascaticas-sj.org)



## ACADEMIA SAN JOSE

October 8, 2004

TO: **Celia Zheng**  
PIA Selective Review  
Universal Service Administrative Company  
School & Libraries Division  
Fax 973-599-6515

Response to E-Rate Selective Review Information Request Form 471 Applications#  
**406993, 407019** year 7 (2004-2005).

### Information Regarding the Competitive Bidding Process and Vendor Selection:

1. The E-Rate funding procurement process for the **Academia San José Elemental** was conducted by the Consorcio de Colegios Católicos Arquidiócesis de San Juan on behalf of the participating schools, as established in the Consortium's participation agreement. Also, the CCCASJ signed an E-Rate Services Agreement. The school submitted a signed the F-471 as a supplement of the agreement. Copy of the agreement is included in Annex 1.
2. The school as a participant entity of the CCCASJ was part of the procurement process. After publishing the F-470, the vendors that contacted either CCCASJ or the school were invited to evaluate the Technology Plan implementation to gather the information they understood was necessary to confirm their proposals. Copy of the Technology Plan is included in Annex 2. (Will be sent by Fedex)
3. The bids were received by the CCCASJ by Madeline Melgen, Ed.D.
4. The service provider selection was recommended by the Consortium's (CCCASJ) technology committee as part of the advisory services to the consortium's participants. The CCCASJ received the service provider proposals, conducted the evaluation process and recommended a Service Provider to the participants.
5. Copy of the school representation agreement by the CCCASJ is included in Annex 3.
6. Included is the agenda of the meeting for the vendor selection notification for Internal Connections and Dedicated Services of year 7 (2004-2005) for the E-Rate Program. At this meeting the CCCASJ explained the evaluation and selection process to the participants. The written communication between the CCCASJ and the entities that are members of the Consortium is included in Annex 4.

**Celia Zheng**

Page -2-

Information Regarding Item 25 Certification

1. Item 25 Worksheet Summary is included as Annex 5.
2. School budget 2004-2005 is included Annex 6.

Cordially,

*Sister Catherine Ortiz*  
**Sister Catherine Ortiz**  
**Principal**

Annex 1

**Service Agreement**

Will be send by Fedex  
to your attention.

Annex 2

**Technology Plan**

Was sent by Fedex to  
your attention.

C.C.C.A.S.J.



## Consorcio Colegios Católicos Arquidiócesis de San Juan

Edificio 2021 Carr. 177 Guaynabo, Puerto Rico 00969-5140  
Teléfono (787) 731-6100 Fax (787) 731-0000

### Acuerdo de Representación

Este es un acuerdo de representación donde **Academia San José Elemental** solicita al Consorcio de Colegios Católicos de la Arquidiócesis de San Juan (Consorcio) representación y apoyo en los procesos relacionados a la solicitud y utilización de fondos del programa E-Rate que administra el School & Libraries Division (SLD), para el Año 7 (07/01/04 a 06/30/05). Este acuerdo define los términos bajo los cuales el Consorcio ofrecerá dicha representación y asesoramiento. Bajo este acuerdo **Academia San José Elemental** y el Consorcio se comprometen a cumplir con las responsabilidades que a cada uno le corresponden según lo establece el SLD y cualquier otro compromiso o responsabilidad que ambos acuerden deben establecer.

#### Consorcio:

- ✓ Asesorará a **Academia San José Elemental** en el desarrollo de su Plan de Tecnología que cumpla con los requisitos de SLD (Schools & Libraries Division).
- ✓ El Consorcio en representación de **Academia San José Elemental** publicará la Forma 470 y atenderá los procesos de establecer los requisitos de licitación, recibir y evaluar propuestas de los suplidores.
- ✓ El Consorcio dirigirá los esfuerzos para proveer información al SLD relacionada con los procesos de solicitud y utilización de los fondos E-Rate.
- ✓ El Consorcio se compromete a cumplir con las funciones que le asigna SLD a los consorcios representantes de entidades solicitantes. (Apéndice II)

#### Colegio/Academia

- ✓ Proporcionará al Consorcio de información necesaria para cumplimentar la solicitud de propuestas, Forma 470.
- ✓ Se compromete a proveer al Consorcio a los suplidores la información que estos solicitan para el proceso de completar sus propuestas.
- ✓ Se compromete a participar en el proceso de someter la Forma 471 y documentos relacionados, respondiendo a las solicitudes de información y firma de acuerdos en las fichas estipuladas.
- ✓ Se compromete a cumplir con los requisitos que establece SLD a las entidades solicitantes (Tabla de cotejo – Apéndice I)

Otros términos y condiciones pueden ser añadidos a este acuerdo, previa aprobación de ambas partes.

Nombre: **Sister Catherine Ortiz, O.P.**

Firma: *Sister Catherine Ortiz, O.P.*

Posición: **Principal**

Fecha: 5 de noviembre de 2003

Nombre: **Madeline Melgen, Ed.D.**

Firma: *Madeline Melgen, Ed.D.*

Posición: **Directora del Consorcio**

Fecha: 5 de noviembre de 2003

“Sirviendo a los Colegios Católicos de San Juan”

Annex 4

**Bidding Process**

Will be send by Fedex  
to your attention.

School Name: Academia San José  
**ITEM 25 WORKSHEET SUMMARY: FAX BACK PAGE 1**

Item 25 Worksheet Summary Please add Subtotals of Sections I through VI	Funding Year 6 (2003-2004)	Funding Year 7 (2004-2005)		
<b>Section I: Connectivity</b>				
I-A. Commitment Amount Requested				
Telecom	1	\$4,920.00		
Internet Access	2	\$9,036.80		
Internal Connections	3	\$1,864.00		
<b>Total of Funding Requests (I-A)</b>	<b>4</b>	<b>\$15,820.80</b>		
I-B. Form 471 Applicant's Share				
Telecom	5	\$7,380.00		
Internet Access	6	\$13,555.20		
Internal Connections	7	\$2,796.00		
<b>Total of Applicant Share (I-B)</b>	<b>8</b>	<b>\$23,731.20</b>		
I-C. Amounts not covered by USF Program				
Telecom	9	\$0.00		
Internet Access	10	\$0.00		
Internal Connections	11	\$0.00		
<b>Total of Amounts Not Covered (I-C)</b>	<b>12</b>	<b>\$0.00</b>		
<b>Total Connectivity (I-A + I-B + I-C)</b>				
<b>\$39,552.00</b>				
<b>Section II: Hardware</b>				
II-A. Number of Computers Connected	13a. #	52	13b. #	66
II-B. Number of Servers Connected	14a. #	1	14b. #	2
II-C. Number of Data/Voice Drops Installed	15a. #	10	15b. #	60
II-D. Applicant Expenditure	16a. \$	\$19,150.00	16b. \$	\$3,500.00
II-E. Contribution / In-Kind Donations	17a. \$	\$4,136.68	17b. \$	\$1,679.90
<b>Total Hardware (II-D + II-E)</b>	<b>18a. \$</b>	<b>\$23,286.68</b>	<b>18b. \$</b>	<b>\$5,179.90</b>
<b>Section III: Professional Development</b>				
III-A. Staff Training Hours (Total 100%):				
0-5 Hrs. ___% 5-15 Hrs. <u>73%</u> 15-25 Hrs. <u>27%</u> 25-50 Hrs. _ 50 + Hrs. ___%				
III-B. Applicant Expenditure	20a. \$	\$11,000.00	20b. \$	\$12,000.00
III-C. Contribution / In Kind Donations	21a. \$	\$0.00	21b. \$	\$0.00
<b>Total Professional Development (III-B + III-C)</b>	<b>22a. \$</b>	<b>\$11,000.00</b>	<b>22b. \$</b>	<b>\$12,000.00</b>
<b>Section IV: Software</b>				
IV-A. Applicant Expenditure	23a. \$	\$6,633.61	23b. \$	\$5,140.00
IV-B Contribution / In Kind Donations	24a. \$	\$0.00	24b. \$	\$0.00
<b>Total Software (IV-A + IV-B)</b>	<b>25a. \$</b>	<b>\$6,633.61</b>	<b>25b. \$</b>	<b>\$5,140.00</b>
<b>Section V: Retrofitting</b>				
V-A. Applicant Expenditure	26a. \$	\$12,089.00	26b. \$	\$64,850.00
V-B Contribution / In Kind Donations	27a. \$	\$0.00	27b. \$	\$0.00
<b>Total Retrofitting (V-A + V-B)</b>	<b>28a. \$</b>	<b>\$12,089.00</b>	<b>28b. \$</b>	<b>\$64,850.00</b>
<b>Section VI: Maintenance</b>				
VI-A. Applicant Expenditure	29a. \$	\$2,000.00	29b. \$	\$10,397.79
VI-B Contribution / In Kind Donations	30a. \$	\$0.00	30b. \$	\$0.00
<b>Total Maintenance (VI-A + VI-B)</b>	<b>31a. \$</b>	<b>\$2,000.00</b>	<b>31b. \$</b>	<b>\$10,397.79</b>
<b>Total of E-Rate Initiative (Total of Section I to VI)</b>	<b>32a. \$</b>	<b>\$55,009.29</b>	<b>32b. \$</b>	<b>\$137,119.69</b>
<b>Technology Implementation Level (Enter Number of schools/libraries at each level from worksheet)</b>				
<b>Level 1 current:</b>	<b>Level 2 current :</b>	<b>Level 3 current: X</b>	<b>Level 4 current:</b>	
<b>Level 1 by 6/30/05:</b>	<b>Level 2 by 6/30/05:</b>	<b>Level 3 by 6/30/05: X</b>	<b>Level 4 by 6/30/05:</b>	

## RESOURCE PLAN: FAX BACK PAGE 2

**Resource Plans and Investments:** On this worksheet you are asked to estimate any relevant investments in the resources you need to make effective use of requested E-rate services that happened prior to Funding Year 2003 covered on the *Item 25 Worksheet Summary: Fax Back Page 1* as well as any other resources that are available to you but which are not represented on the *Item 25 Worksheet*. Please use this space, or attach an additional page, to provide narrative information about both your plans and strategies for securing the necessary resources to make effective use of the requested services and previous years' investments in technology. You may use the space below to cross reference sections of your approved technology plan, your budget, or other relevant documentation. If you have made a significant investment in technology prior to Funding Year 2003, please summarize these resources that are already in place. If you have applied for matching funds or grants from other sources that have not been approved yet, please note it. Include all information about resources that you have available to make effective use of E-rate funding.

En el transcurso del año 2002-03 se construyó el Edificio  
Multiusos - San Rafael - a un costo aproximado de \$1.5  
millones de dólares. En el mismo se instalaron sillas  
para acomodar a 800 personas.  
Cuenta con una tarima y sistema de luces y sonido.

Se instalaron plafones nuevos en el área de la biblioteca  
y del Centro de Recursos (salón preparado con 15  
computadoras). Este trabajo tuvo un costo de aproximadamente  
\$3,000.-

### E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE 3

**E-rate Implementation:** On this worksheet please describe your overall strategy for implementing your E-rate requests this year, noting especially any differences if not all of your facilities are at the same technology implementation level. Please give us an overall picture of what you are trying to accomplish so that we can better understand how the requested services will work in conjunction with the resources that you have identified throughout this document.

Todas las maestras tienen acceso al Centro de Recursos que cuenta con 15 computadoras. En las mismas los estudiantes entran a los diferentes "sites" que las maestras previamente han designado o preparado para complementar sus clases ( estos podrían consistir en programados, Internet o clases preparadas en Power Point"). Además, los estudiantes tienen la oportunidad de hacer proyectos usando las diferentes opciones y técnicas existentes. (Word, Power Point, etc)

En la biblioteca específicamente, se utiliza el equipo para dar talleres tanto a estudiantes como a la facultad sirviendo de apoyo tecnológico a los diferentes temas que se cubren.

Blank lined area for additional text.

# E-RATE IMPLEMENTATION DESCRIPTION: FAX BACK PAGE

## Selective Review Information Request Completion Certification

If the applicant's authorized representative completed the information in this document, please attach a copy of the letter of agency or other agreement between the applicant and consultant authorizing them to act on the school or library's behalf. For the purposes of this form, in the *Employer's Name* field, a consultant should enter the name of his or her consulting firm.

### SECTION 1: AUTHORIZED SIGNER INFORMATION

Name <b>Sister Catherine Ortiz</b>	Title <b>Principal</b>		
E-mail Address	Telephone Office <b>787-792-7489</b>		Fax <b>787-792-7440</b>
Employer's Name <b>Academia San José Elemental</b>			
Employer's Street Address <b>ZM-215 Villa Caparra, Guaynabo</b>		State <b>PR</b>	Zip Code <b>00966</b>

### SECTION 2: APPLICANT INFORMATION

Billed Entity Name <b>Academia San José Elemental</b>	Billed Entity Number <b>205385</b>
Funding Year 2004 Forms 471 Application Numbers: <b>406993, 407019</b>	

### SECTION 3: CERTIFICATION STATEMENT

\* I certify that I prepared the responses in this document on behalf of the above named entity.  
 \* I certify that despite any budget deficits, fund-raising effort shortfalls, or other uncertainties that the funding sources(s) identified for my applicant share of E-rate will not be affected.

Authorized Signer's Signature <i>Maddeline Melgen, Ed.D.</i>	Date <b>October 14, 2004</b>
Authorized School Official's Signature <i>Sister Catherine Ortiz, O.P.</i>	Date <b>October 14, 2004</b>

#### Selective Review Information Request Checklist:

Remember to include all of the following in your response:

- \* Copies of signed and dated contracts relating to the Form (s) 471 for all contracted services, except those contracts that are state master contracts.
- \* Copies of all requests for proposals, etc., where a vehicle other than the Form 470 was used for procurement.
- \* Copies of all bids that were received for all funding requests.
- \* Complete documentation regarding the process used for selecting your service provider(s).
- \* Copies of any consulting agreements.
- \* Correspondence between the consultant/service provider and the school/library regarding the competitive bidding process and the application process.
- \* Copy of your technology plan that supports your funding request for Funding Year 2004.
- \* Fax Back Pages 1-4
- \* Approved operating budget which includes both revenues and expenses or alternative budget documentation.
- \* Letter of agency or agreement if responder is authorized representative of the eligible entity, if required.



# ACADEMIA SAN JOSE

## PRELIMINAR BUDGET FOR SCHOOL YEAR 2004-2005

### INCOMES:

Matriculation	\$ 336,770	
Tuition	\$ 2,878,775	* E-rate income \$ 23,731.20
Building fund	\$ 118,925	
Late charge income	\$ -0-	
Day care income	\$ -0-	
Uniforms sales	\$ -0-	
Cafeteria	\$ -0-	
Graduation quota	\$ -0-	
Other Incomes (MAINTENANCE)	\$ 302,800	
Interests	\$ 20,350	
Rental of facilities	\$ 6,500	
Insurances	\$ 10,050	
Register	\$ 17,420	
Income from activities	\$ 12,500	
Donations	\$ 15,000	
Scholarships	\$ 37,850	
Other	\$ -0-	

TOTAL INCOME

\$ 3,756,940

### EXPENSES

Payroll Including Benefits	\$ 2,705,015	
Educational Materials, Activities and others	\$ 43,543	
Operation and maintenance	\$ 493,780	* E-rate expenses \$ 23,721.30
Mortgages	\$ 9,200	
Others	\$ 31,300	

TOTAL EXPENSES

\$ 3,282,838

GAIN/LOSS

\$ 474,102

Presented by:

*Pedro E. del Toro*

TRANSMISSION VERIFICATION REPORT

TIME : 10/13/2004 11:05  
NAME :  
FAX :  
TEL :

DATE, TIME	10/13 11:02
FAX NO./NAME	19735996515
DURATION	00:02:58
PAGE(S)	12
RESULT	OK
MODE	STANDARD ECM

**SUPERINTENDENCIA DE ESCUELAS  
CATOLICAS**

***PROGRAMA E-RATE***

**FAX (787) 272-0771**

FACSIMILE TRANSMITTAL SHEET

TO: Jennifer Hung	FROM: Mariegloric Zapata
COMPANY: PIA Selective Review	DATE: 10/15/2004
FAX NUMBER: 1-973-599-6515	TOTAL NO. OF PAGES INCLUDING COVER: 12
PHONE NUMBER:	SENDER'S REFERENCE NUMBER:
RE: ACADEMIA SAN JOSE	YOUR REFERENCE NUMBER:

URGENT     FOR REVIEW     PLEASE COMMENT     PLEASE REPLY     PLEASE RECYCLE

NOTES/COMMENTS:

Enclosed are requested documents.

Mariegloric Zapata  
E-Rate Administrative Assistant  
e-mail: [mzapata@escuelascaticas-si.org](mailto:mzapata@escuelascaticas-si.org)



**Universal Service Administrative Company**  
Schools & Libraries Division

Date: 11/03/2004

Dear Madeline Melgen,  
Applicant Name (All Puerto Rico Applications you have)  
Contact Number: 1-787-731-6100  
Application Number(s): Multiple

The Program Integrity Assurance (PIA) team is in the process of reviewing all Form 471 Applications for schools and libraries discounts to ensure that they are in compliance with the rules of the federal universal service program. We are currently in the process of reviewing your Funding Year 2004 Form 471 Application. To complete our review, we need some additional information. The information needed to complete the review is listed below.

Madeline, we are trying to find out how you get your discount information for NSLP. I'm sure you have something different, however, we will need to have documentation for all the Schools, Public, Private, Academies, Catholic, etc., with the **Total Student Enrollment** and those eligible for **Free (Gratis) & Reduced (Reducido) lunches**.

I tried to call the E-Rate coordinator for Puerto Rico, but no one spoke English.

If there is anything you can do, it will certainly speed up processing the applications. I don't know if you are the only one working on the applications for Puerto Rico, if there are others we will need a complete list of the schools with the information above.

Thanks so much for your prompt attention in this matter.

If you have already submitted the Item 21 Attachments, please fax an EXACT COPY of the Item 21 Attachments that were previously submitted. If you do not wish to resubmit the Item 21 Attachment, you are not required to do so. We will process your application once the Item 21 Attachments have been scanned into our system.

Please fax or e-mail the requested information to my attention. If you have any questions, please feel free to contact me.

It is important that we receive all of the information requested so we can complete our review. **Failure to do so may result in a reduction or denial of funding.**

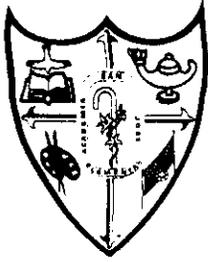
**Please send the requested information within seven calendar days. If you need additional time to prepare your response, please let me know as soon as possible.**

Thank you for cooperation and continued support of the Universal Service Program.

Sincerely,

Nancy A. Rocco  
Schools And Libraries Division  
Program Integrity Assurance  
Phone: 973-884-8250  
FAX: 973-599-6522  
nrocco@sl.universalservice.org





## ACADEMIA SAN JOSE

November 29, 2004

Schools and Libraries Division  
 Program Integrity Assurance  
 Fax (973) 599-6578

Academia San José (BEN#205385) wants to validate the original request discount of 40%.

1. Total number of students enrolled.	652
2. Number of surveys/applications sent out	652
3. Number of surveys/applications returned	416
4. Total number of students qualified for NSLP (as per the returned surveys/applications)	15
5. Are the surveys/applications and results kept on file	YES

"I certified that only those students who meet the Income Eligibility Guidelines of the National School Lunch Program have been included in Column 5 Item 10b of Block 4 (worksheet A) of the Form 471".

Enclosed is a copy of the survey applied.

Cordially,

*Sister Catherine Ortiz, P.*  
 Sister Catherine Ortiz  
 Principal

mza



Universal Service Administrative Company  
Schools & Libraries Division

November 24, 2004

Dr. Madeline Melgen, Ed. D.  
Academia San Jose  
Phone 787-731-6100  
Fax 787-731-0000  
Application Numbers 406993, 407019

Dear Dr. Melgen,

The Program Integrity Assurance (PIA) team is in the process of reviewing all Form 471 Applications for schools and libraries discounts to ensure that they are in compliance with the rules of the federal universal service program. We are currently in the process of reviewing your Funding Year 2004 Form 471 Application. To complete our review, we need some additional information. The information needed to complete the review is listed below.

Based upon review of your Form 471 application, we were not able to validate your requested discount of 40% . If you choose to validate your original requested discount of 40%, then please provide the appropriate documentation to validate your requested discount percentage.

**Please identify the method used to calculate your requested discount percentage.**

**If the discount percentage was determined by information obtained from a survey/application, please provide the following information:**

- 1) Total number of students enrolled
- 2) Total number of surveys/applications sent out
- 3) Number of surveys/applications returned
- 4) Total number of students that qualified for the National School Lunch Program, using the Income Eligibility Guidelines (IEG) of the NSLP, per the returned surveys/applications
- 5) Are the surveys/applications and results kept on file.
- 6) Provide a sample copy of a FILLED OUT SURVEY/APPLICATION with the child's personal information crossed out for confidentiality.
- 7) A signed certification that reads: "I certify that only those students who meet the Income Eligibility Guidelines of the National School Lunch Program have been included in Column 5 of Item 10b, of Block 4 (Worksheet A) of the Form 471."

- 8) This information must be in writing on school letterhead and signed by a school official (such as the Principal, Vice-Principal, Superintendent, Director of Food Services).

If the discount was determined using a different method than what was identified above, please indicate the method that was used.

- Please fax or e-mail your response to me.
- Be sure to sign the cover sheet of your fax.
- If you -Email, do NOT click "reply", but create a new E-mail using the address shown below.

**In all correspondence, please make sure to include your Full Name and Official Title.**

If you have any questions, please feel free to contact me.

It is important that we receive all of the information requested so we can complete our review. **Failure to do so may result in a reduction or denial of funding.**

**Please send the requested information within seven calendar days (by December 3, 2004), sooner if possible. If you need additional time to prepare your response, please let me know as soon as possible.**

Thank you for cooperation and continued support of the Universal Service Program.

Sincerely,

Michael Porcelan  
Initial Reviewer  
Program Integrity Assurance  
Schools and Libraries Division  
Phone: 973-884-8260  
FAX: 973-599-6578  
[mporcel@sl.universalservice.org](mailto:mporcel@sl.universalservice.org)



Universal Service Administrative Company  
Schools & Libraries

80 South Jefferson Road  
Whippany, New Jersey 07981  
Fax: 973-599-6515

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**FAX TRANSMISSION COVER SHEET**

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To: Madeline Melgen  
Fax: 1 787 731 0000  
Subject: CASE SR-2004-BEN-205385 - ACADEMIA SAN JOSE - ELEMENTAL  
From: PIAIntegrated  
Date: February 02, 2005  
Time: 2:25:55 PM

YOU SHOULD RECEIVE 4 PAGE(S), INCLUDING THIS COVER SHEET. IF YOU DO NOT RECEIVE ALL THE PAGES, PLEASE CALL THE CONTACT SPECIFIED BELOW.

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**Date: February 2, 2005**

To: Madeline Melgen

E-Mail: [mmelgen@escuelascaticas-sj.org](mailto:mmelgen@escuelascaticas-sj.org)

Entity: **205385 – ACADEMIA SAN JOSE - ELEMENTAL**

Fax #: [Fax: Madeline Melgen@1 787 731 0000]

Phone: 787-731-6100

**Sender: Bob Leipow**

**Privilege and Confidentiality Notice**

The information in this telecopy is intended for the named recipients only. It may contain information that is privileged, confidential or otherwise protected from disclosure. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution, or the taking of any action in reliance on the contents of this telecopied material is strictly prohibited. If you have received the telecopy in error, please notify us by telephone immediately and mail the original to us at the above address. Thank you.

Phone: 973-581-6738  
Fax: 973-599-6515  
E-mail: rleipow@sl.universalservice.org

**Subject: Funding year 2004 Selective Review Follow-Up Questions**

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This FAX is a follow-up to the information Marieglorig Zapata sent to Jennifer Hung on October 15, 2004 regarding our selective review of **ACADEMIA SAN JOSE - ELEMENTAL**. I've taken over Jennifer Hung's responsibilities for completing this selective review. In this letter we are requesting the **approved operating budget** for this school. The budget that was previously sent is not labeled the approved operating budget.

It is important that we receive all of the information requested by the close of business **February 10, 2005**. If we do not receive the information by then, your application will be reviewed using the information currently on file, which could result in a reduction or denial of funding. If you need additional time to prepare your response, please let me know as soon as possible. Please fax or e-mail the requested information to my attention. If you have any questions please feel free to contact me.

Please refer to the attached document.



**Universal Service Administrative Company**

Schools & Libraries Division

CASE SR-2004-BEN-205385

Date: February 2, 2005  
 To: Madeline Melgen  
 E-Mail: mmelgen@cscuclascaticas-sj.org  
 Entity: **205385 – ACADEMIA SAN JOSE - ELEMENTAL**  
 Fax #: [Fax: Madeline Melgen@1 787 731 0000]  
 Phone: 787-731-6100  
 Sender: Bob Leipow  
 Phone: 973-581-6738  
 Fax: 973-599-6515  
 E-mail: rleipow@sl.universalservice.org  
 Subject: Funding year 2004 Selective Review Follow-Up Questions

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**-1-**

**BUDGET:**

- At this time, **do you have an approved operating budget** for 2004-2005? If so, please submit an operating budget for 2004-2005 showing **both revenues and expenses, indicating where your portion of e-rate is allocated.**
  - **State that it is the approved operating budget.**
  - Be sure to specify **the name of the school** to which the budget applies.
  - Please clearly specify the **time frame** that the budget covers, including a starting date and ending date (for example, July 1, 2003 - Jun 30, 2004).
  - **Writing on the actual budget, place an arrow next to each fund/budget line, on BOTH the revenue and expense side of your budget, showing where you**

have allocated the necessary dollars for your share of E-Rate. Please write the specific amount that will come from each fund/budget line. For example, if budget line A002 contains \$200,000 and \$130,000 will be used to pay your share of E-Rate, then please draw an arrow to it and write "E-Rate, \$130,000."

- Note: if a final, approved budget is provided; we may verify that budget with independent sources
- **If an approved budget is still not available** or in the early stages of an approval process, **we will need two items.** The first is a letter signed by a school or library official (superintendent, board president, chief business administrator). This letter should explain what phase of the approval process you are in, whether your share of funding is contingent on any outside action (e.g. voter approval, board approval, state legislation, etc.) and whether in the absence of such outside approval, you anticipate being able to meet your share of the E-RATE amount. Also make sure that the letter identifies the specific amount that you will have available to pay your share. For example, if you have \$100,000 that you will be putting in your budget, make sure that that is noted in the letter. **In addition** to that letter (and in lieu of a finalized budget), we will need **one of the following** as noted below:
  - A draft budget for FY 2004-2005 showing both revenues and expenses indicating from where your portion of e-rate is coming.
  - A resolution of a governing Board authorizing the filing of a Form(s) 471 for a given dollar amount, for given services and/or products, within a given timeframe. For us to consider such a resolution sufficient evidence that your entity has provided for payment of your share of E-rate, the resolution should specify the funding year, the fiscal year, or the school year during which the payment is authorized.
  - If donations (or other dollars from any contributor) are a source, a signed commitment letter from the donor (e.g. school or library foundation) to the applicant specifying 1) the level and commitment of funds or other resources; 2) the timing of the delivery of such resources, along with a positive indication that the resources are for E-rate supported products/services or for items needed to use effectively with the discounted services. (The indication as to the use of the resources might come from the donor or be reflected in a Board resolution committing donations to E-rate related purposes.)
  - Please note: If a final, approved budget is **not** available, we require a **combination** of a letter (described above) **AND** one of the bulleted examples above. We require **both**, not one or the other.

Please do not hesitate to call me, should you have any questions. Thank you for your cooperation and remember that any information requested must be faxed or e-mailed within 7 calendar days from today. If you need additional time to prepare your response, please let me know as soon as possible. If you are going to send e-mail to me, please make sure that at the end of your e-mail you have your Full Name and Official Title. Please call me if you have questions at 973-581-6738

Thank you.

**Bob Leipow**  
Selective Reviewer  
Associate Manager - SLD  
Phone: 1-973-581-6738  
Fax: 1-973-599-6515  
Email: rleipow@sl.universalservice.org



**FUNDING COMMITMENT DECISION LETTER**

(Funding Year 2004: 07/01/2004 - 06/30/2005)

March 24, 2005

Madeline Melgen Ed D  
ACADEMIA SAN JOSE ELEMENTAL  
Road 177 Building 2021  
Camino Alejandrino  
Guaynabo, PR 00969-5140

Re: Form 471 Application Number: 406993  
Funding Year 2004: 07/01/2004 - 06/30/2005  
Billed Entity Number: 205385  
Applicant's Form Identifier: TEL2005385

Thank you for your Funding Year 2004 E-rate application and for any assistance you provided throughout our review. Here is the current status of the funding request(s) featured in the Funding Commitment Report at the end of this letter.

- The amount, \$6,978.40 is "Approved."

Please refer to the Funding Commitment Report on the page following this letter for specific funding request decisions and explanations.

The Important Reminders and Deadlines immediately preceding this letter are provided to assist you throughout the application process.

**NEXT STEPS**

- Review technology planning approval requirements
- Review CIPA Requirements
- File Form 486
- Invoice the SLD using the Form 474 (service providers) or Form 472 (Billed Entity)

**FUNDING COMMITMENT REPORT**

On the pages following this letter, we have provided a Funding Commitment Report for the Form 471 application cited above. The enclosed report includes a list of the Funding Request Number(s) (FRNs) from your application. The SLD is also sending this information to your service provider(s) so preparations can be made to begin implementing your E-rate discount(s) after you file your Form 486. Immediately preceding the Funding Commitment Report, you will find a guide that provides a definition for each line of the Report.

**TO APPEAL THIS DECISION:**

If you wish to appeal the decision indicated in this letter, your appeal must be received by the SLD or postmarked within 60 days of the date of this letter. Failure to meet this requirement will result in automatic dismissal of your appeal. In your letter of appeal:

1. Include the name, address, telephone number, fax number, and e-mail address (if available) for the person who can most readily discuss this appeal with us.
2. State outright that your letter is an appeal. Identify which Funding Commitment Decision(s) you are appealing. Indicate the relevant funding year and the date

of the FCDL. Your letter of appeal must also include the Billed Entity Name, the Form 471 Application Number, and the Billed Entity Number from the top of your letter.

3. When explaining your appeal, copy the language or text from the Funding Commitment Report that is at the heart of your appeal, to allow the SLD to more readily understand your appeal and respond appropriately. Please keep your letter to the point, and provide documentation to support your appeal. Be sure to keep copies of your correspondence and documentation.
4. Provide an authorized signature on your letter of appeal.

If you are submitting your appeal on paper, please send your appeal to: Letter of Appeal, Schools and Libraries Division, Box 125 - Correspondence Unit, 80 South Jefferson Road, Whippany, NJ 07981. Additional options for filing an appeal can be found in the "Appeals Procedure" posted in the Reference Area of the SLD web site or by contacting the Client Service Bureau. We encourage the use of either the e-mail or fax filing options.

While we encourage you to resolve your appeal with the SLD first, you have the option of filing an appeal directly with the Federal Communications Commission (FCC). You should refer to CC Docket No. 02-6 on the first page of your appeal to the FCC. Your appeal must be received by the FCC or postmarked within 60 days of the above date on this letter. Failure to meet this requirement will result in automatic dismissal of your appeal. If you are submitting your appeal via United States Postal Service, sent to: FCC, Office of the Secretary, 445 12th Street SW, Washington, DC 20554. Further information and options for filing an appeal directly with the FCC can be found in the "Appeals Procedure" posted in the Reference Area of the SLD web site or by contacting the Client Service Bureau. We strongly recommend that you use either the e-mail or fax filing options.

#### NOTICE ON RULES AND FUNDS AVAILABILITY

Applicants' receipt of funding commitments is contingent on their compliance with all statutory, regulatory, and procedural requirements of the Schools and Libraries Universal Service Support Mechanism. Applicants who have received funding commitments continue to be subject to audits and other reviews that USAC and/or the FCC may undertake periodically to assure that funds that have been committed are being used in accordance with all such requirements. The SLD may be required to reduce or cancel funding commitments that were not issued in accordance with such requirements, whether due to action or inaction, including but not limited to that by the SLD, the applicant, or the service provider. The SLD, and other appropriate authorities (including but not limited to USAC and the FCC), may pursue enforcement actions and other means of recourse to collect erroneously disbursed funds. The timing of payment of invoices may also be affected by the availability of funds based on the amount of funds collected from contributing telecommunications companies.

Schools and Libraries Division  
Universal Service Administrative Company

## A GUIDE TO THE FUNDING COMMITMENT REPORT

A report for each E-rate funding request from your application is attached to this letter. We are providing the following definitions for the items in that report.

**FORM 471 APPLICATION NUMBER:** The unique identifier assigned to a Form 471 application by the SLD.

**FUNDING REQUEST NUMBER (FRN):** A Funding Request Number is assigned by the SLD to each Block 5 of your Form 471 once an application has been processed. This number is used to report to applicants and service providers the status of individual funding requests submitted on a Form 471.

**FUNDING STATUS:** Each FRN will have one of the following definitions:

1. An FRN that is "Funded" is approved at the level that the SLD determined is appropriate for this FRN. The funding level will generally be the level requested unless the SLD determines during the application review process that some adjustment is appropriate.
2. An FRN that is "Not Funded" is one for which no funds were committed. The reason for the decision will be briefly explained in the "Funding Commitment Decision Explanation." An FRN may be "Not Funded" because the request does not comply with program rules, or because the total amount of funding available for this Funding Year was insufficient to fund all requests.
3. An FRN that is "As Yet Unfunded" reflects a temporary status that is assigned to an FRN when the SLD is uncertain at the time the letter is generated whether there will be sufficient funds to make commitments for requests for Internal Connections at a particular discount level. For example, if your application included requests for discounts on both Telecommunications Services and Internal Connections, you might receive a letter with funding commitments for your Telecommunications Services funding requests and a message that your Internal Connection requests are "As Yet Unfunded." You would receive one or more subsequent letters regarding the funding decision on your Internal Connections requests.

**SERVICES ORDERED:** The type of service ordered from the service provider, as shown on your Form 471.

**SPIN (Service Provider Identification Number):** A unique number assigned by the Universal Service Administrative Company to service providers seeking payment from the Universal Service Fund for participating in the universal service support mechanisms. A SPIN is also used to verify delivery of services and to arrange for payment.

**SERVICE PROVIDER NAME:** The legal name of the service provider.

**CONTRACT NUMBER:** The number of the contract between the eligible party and the service provider. This will be present only if a contract number was provided on your Form 471.

**BILLING ACCOUNT NUMBER:** The account number that your service provider has established with you for billing purposes. This will be present only if a Billing Account Number was provided on your Form 471.

**SERVICE START DATE:** The date services were reported to start for this FRN on your Form 471.

**CONTRACT EXPIRATION DATE:** The date the contract expires. This will be present only if a contract expiration date was provided on your Form 471.

**SITE IDENTIFIER:** The Entity Number listed in Form 471, Block 5, Item 22a. This will be present only for "site specific" FRNs.

**ANNUAL PRE-DISCOUNT AMOUNT FOR ELIGIBLE RECURRING CHARGES:** Eligible monthly pre-discount amount approved for recurring charges multiplied by number of months of recurring service approved for the funding year.

**ANNUAL PRE-DISCOUNT AMOUNT FOR ELIGIBLE NON-RECURRING CHARGES:** Annual eligible non-recurring charges approved for the funding year.

**PRE-DISCOUNT AMOUNT:** Amount in Form 471, Block 5, Item 23I, as determined through the application review process.

DISCOUNT PERCENTAGE APPROVED BY THE SLD: The discount rate that the SLD has approved for this service.

FUNDING COMMITMENT DECISION: This represents the total amount of funding that the SLD has reserved to reimburse your service provider for the approved discounts for this service for this funding year. It is important that you and your service provider both recognize that the SLD should be invoiced and the SLD may direct disbursement of discounts only for eligible, approved services actually rendered.

FUNDING COMMITMENT DECISION EXPLANATION: This entry provides an explanation of the amount in the "Funding Commitment Decision."

FUNDING COMMITMENT REPORT

Form 471 Application Number: 406993

Funding Request Number: 1115118 Funding Status: Funded

Services Ordered: Telecommunications Service

SPIN: 143012431 Service Provider Name: Puerto Rico Telephone Company, I

Contract Number: T

Billing Account Number: 787-792-7489

Service Start Date: 07/01/2004

Contract Expiration Date: 06/30/2005

Site Identifier: 205385

Annual Pre-discount Amount for Eligible Recurring Charges: \$12,300.00

Annual Pre-discount Amount for Eligible Non-recurring Charges: \$.00

Pre-discount Amount: \$12,300.00

Discount Percentage Approved by the SLD: 20%

Funding Commitment Decision: \$2,460.00 - ERN approved as submitted

Funding Request Number: 1115121 Funding Status: Funded

Services Ordered: Internet Access

SPIN: 143022659 Service Provider Name: A New Vision in Educational Serv

Contract Number: MTM

Billing Account Number: 205385

Service Start Date: 07/01/2004

Contract Expiration Date: 06/30/2005

Site Identifier: 205385

Annual Pre-discount Amount for Eligible Recurring Charges: \$16,572.00

Annual Pre-discount Amount for Eligible Non-recurring Charges: \$6,020.00

Pre-discount Amount: \$22,592.00

Discount Percentage Approved by the SLD: 20%

Funding Commitment Decision: \$4,518.40 - ERN approved as submitted

# USAC

Schools and Libraries Division  
Box 125 - Correspondence Unit  
80 South Jefferson Road  
Whippany, New Jersey 07981



**TIME SENSITIVE MATERIAL**

00234  
Madeline Melgen Ed D  
ACADEMIA SAN JOSE ELEMENTAL  
Road 177 Building 2021  
Camino Alejandrino  
Guaynabo, PR 00969-5140



## IMPORTANT REMINDERS & DEADLINES

Date: March 24, 2005  
471 : 406993  
BEN : 205385

The following information is provided to assist you throughout the application process. We recommend that you keep it in an easily accessible location and that you share it with the appropriate members of your organization.

**FORM 486 DEADLINE** - The Form 486 must be postmarked no later than 120 days after the Service Start Date you report on the Form 486 or no later than 120 days after the date of the Funding Commitment Decision Letter, whichever is later. If you are required to have a Technology Plan, that plan must be approved by the start of service for this funding year, you must indicate the SLD Certified Technology Approver who approved your plan and you must retain your approval letter and documentation of your monitoring of the progress toward your stated goals.

**CHILDREN'S INTERNET PROTECTION ACT (CIPA)** - You must be in compliance with CIPA and cannot request a waiver, if FY2004 is your Third Funding Year for the purposes of CIPA.

**INVOICE DEADLINE** - Invoices must be postmarked no later than 120 days after the last date to receive service - including extensions - or 120 days after the date of the Form 486 Notification Letter, whichever is later. Invoices should not be submitted until the invoiced products and services have been delivered and billed, and (for BEAR Forms) the provider has been paid.

**OBLIGATION TO PAY NON-DISCOUNT PORTION** - Applicants are required to pay the non-discount portion of the cost of the products and/or services. Service providers are required to bill applicants for the non-discount portion. The FCC has stated that requiring applicants to pay their share ensures efficiency and accountability in the program. If you are using a trade-in as part of your non-discount portion, please refer to the SLD web site.

**RETAIN DOCUMENTATION** - Applicants must retain documentation, including but not limited to, documents showing:

- compliance with all applicable competitive bidding requirements,
- products and/or services delivered (e.g., customer bills detailing make, model and serial number),
- resources necessary to make effective use of E-rate discounts, including the purchase of equipment such as workstations not eligible for support,
- the specific location of each item of E-rate funded equipment, and
- the applicant has paid the non-discount portion.

These documents must be retained and available for review for 5 years.

**SUSPENSION AND DEBARMENT** - Persons who have been convicted of criminal violations or held civilly liable for certain acts arising from their participation in the Schools and Libraries Support Mechanism are subject to suspension and debarment from the program.

**FREE SERVICES ADVISORY** - Applicants and service providers are prohibited from using the Schools and Libraries Support Mechanism to subsidize the procurement of ineligible or unrequested products and services, or from participating in arrangements that have the effect of providing a discount level to applicants greater than that to which applicants are entitled.

Complete program information - including more information on these reminders - is posted to the Schools and Libraries Division (SLD) web site at [www.sl.universalservice.org](http://www.sl.universalservice.org). You may also contact the SLD Client Service Bureau by e-mail using the "Submit a Question" link on the SLD web site, by fax at 1-888-276-8736 or by phone at 1-888-203-8100.